



Department of
Medicaid

Sandata

Get more right from the start

EVV: Fact or Fiction?

Intended Audience: Agency and Non-Agency Providers

NOTE: This webinar will begin 5 minutes after the start time.

Developed September 2022

Sound Test



We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

This presentation is intended for agency and non-agency providers that are using the Sandata Electronic Visit Verification (EVV) system, provided by the state, agency providers using an alternate vendor for visit capture and management, and any other interested stakeholders.

Welcome!



Agenda

- Terms and Definitions
- Fact or Fiction Activity
- Resources
- Q & A

Terms and Definitions

Terms and Definitions

Alternate EVV: An EVV system other than Sandata, where agency providers can manage records and visits

Client: An individual who receives services subject to EVV requirements

Employee: A person who is employed by an agency provider to provide care to one or more clients (individuals)

Terms and Definitions

eTRAC: The portal used to access the Sandata EVV Welcome Kit, and manage devices

Exception: An indicator of missing information or details on the visit that need addressed in EVV

Incomplete Visit: A status indicating a visit needs corrections

Provider: An agency or independent provider that provides care to an individual and records services using EVV



Terms and Definitions

Processed Visit: A visit that does not contain any exceptions, and has been matched with a claim

Sandata EVV: The online portal used to manage Sandata EVV visits and records and view visits from alternate systems

(<https://evv.sandata.com>)

Sandata Mobile Connect (SMC): Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on a Sandata EVV device



Terms and Definitions

Telephony: Sandata's telephone visit recording option; providers dial an automated line and answer questions to record a visit

User: A person with a unique login and password to the Sandata EVV portal

Verified Visit: A visit that does not contain any exceptions, but has not yet been matched with a claim

Fact or Fiction?

Test Question

Please use the Q & A function to respond FACT or FICTION:

Today is Thursday, September 22nd.

FACT

Test Question

Today is September 22nd! After each question, we will review why the answer was FACT, or, why the answer was FICTION. We will also share resources and helpful hints related to each topic.

Example Resources

- [Sandata EVV Video Library](#)

Fact or Fiction: EVV

Please use the Q & A function to respond FACT or FICTION:

EVV is not required during the public health emergency (PHE).

FICTION



EVV Requirements – PHE

Training requirements had been modified so that providers did not have to get the training prior to becoming an Ohio Medicaid provider.

The training requirement was always in place and EVV has been required.

With the implementation of the PNM on October 1st, new providers must upload their EVV training certificate when onboarding with ODM. Current providers may be required to upload the training certificate when re-validating.



Fact or Fiction: evv.sandata.com

Please use the Q & A function to respond FACT or FICTION:

If I am logging visits using mobile visit verification or the telephone, I do not need to sign in to <https://evv.sandata.com/>

FICTION



Why do I need the EVV website?

If you are an independent provider, you will need to sign in to EVV **first**, to create the client record(s).

If you are an agency user using the Sandata EVV system, you will need to sign in to the EVV site to create client, employee, and user records.

Agency users and non-agency providers use Sandata EVV visit maintenance to view and edit visit information before submitting claims.

Agency providers using an Alternate EVV system use aggregator access to view visits submitted from their alternate vendor.



Visit Maintenance vs Aggregator

Providers using the Sandata EVV system will use evv.sandata.com to access visit maintenance and manage records.

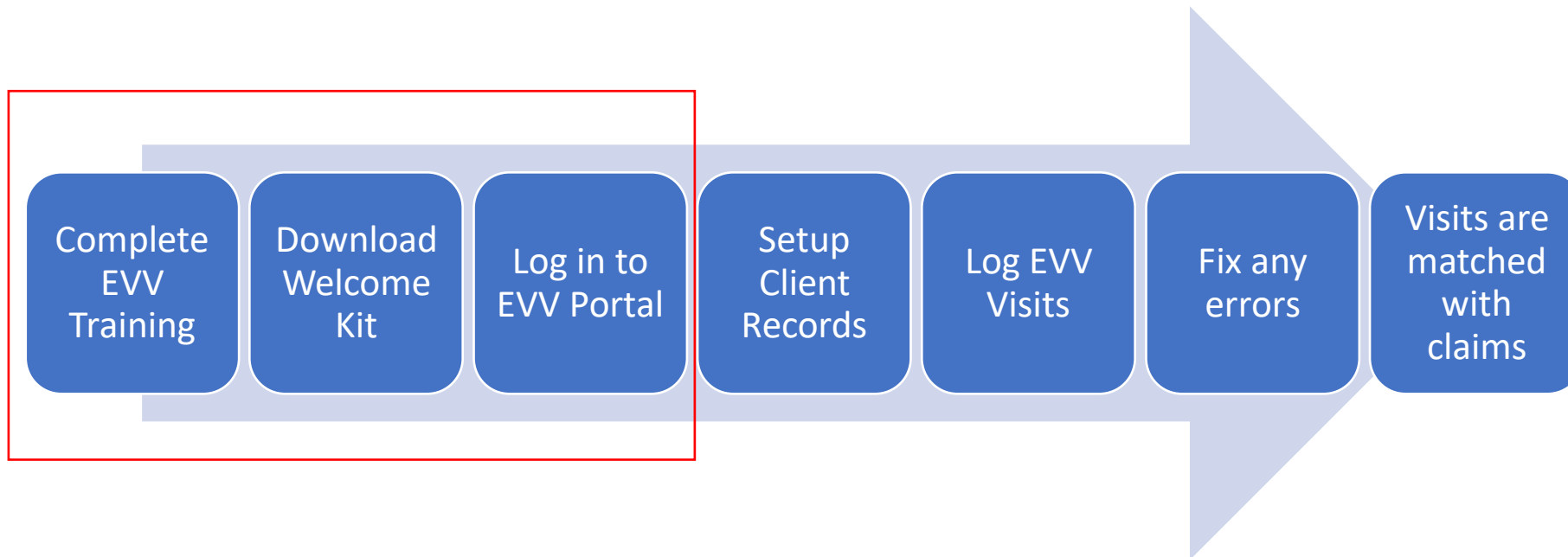
Providers using an alternate EVV system will use evv.sandata.com to access the Sandata Aggregator

- Alternate EVV systems send your client, employee, and visit information to the Sandata Aggregator for claims matching. If your information within Sandata Aggregator does not accurately reflect what you have in your alternate EVV system, your visits will never match your claims.



How do I sign in to EVV?

To obtain credentials to EVV, you must first complete required training.



Get Started in EVV

EVV Fact Sheet

Getting Started Checklist – Providers using Sandata system

- ✓ Complete EVV Training:
 - » Agency Training.
 - » Independent (Non-Agency) Training.
- ✓ Receive email with credentials to sign into Sandata eTRAC website.
- ✓ Sign in and download your unique Sandata Welcome Kit.
- ✓ Log into EVV Portal.
- ✓ Set up correct individuals, services, employees, etc., as applicable in EVV Portal.
- ✓ Start capturing visits when providing services to individuals.

Agency providers using an Alternate EVV system may require a different Getting Started process.

Fact or Fiction: Client Services

Please use the Q & A function to respond FACT or FICTION:

The payer / program / service in the client record does not matter.

FICTION

Why is the payer important?

In Sandata EVV, only the payer on the client record is reflected on the visit which is used for claims matching.

Most service codes are used by more than one payer.

- Click [here](#) for a full list of EVV payers, programs, and services
- For ODA only: If the Medicaid ID is pending and the individual has a PIMS ID, enter the PIMS ID in the Client Payer ID field
 - Click [here](#) for video instructions

Why is the service important?

The service reflects what occurred during the visit

The payer, program, and service on the visit must **match** the client record for the visit to be eligible for claims matching. When the service on the client record does not match the service on the visit; Sandata will automatically place an “unauthorized service” exception on the visit and the visit will be in an “incomplete” status until the exception is resolved

- ▶ Agencies using alternate vendors will need to make edits to services in their source system. The Aggregator should be checked to ensure service information has been captured correctly for the client

You can add, modify, or remove services at any time.



Fact or Fiction: Client Medicaid ID

Please use the Q & A function to respond FACT or FICTION:

Some client records can be saved without a Medicaid ID number, if certain requirements are met.

Fact



Who may not have a Medicaid ID?

Individuals in receipt of State-Funded services through the Ohio Department of Medicaid are pending PASSPORT waiver approval and a Medicaid ID

Newborns who fall under Deemed Newborn Medicaid eligibility because their mother was determined Medicaid eligible at the time of the child's birth. More information regarding this eligibility can be found in [OAC 5160:1-4-02](#)

- Users of Alt EVV systems will need to hold all visits for individuals with the newborn indicator until a Medicaid ID is issued as visits will be rejected for these individuals



How do I update the record later?

The record can be updated at any time from the Data Entry > Clients tab.

- [Modify Client](#)

If the client was a newborn, providers should remove the Newborn indicator once the Medicaid ID is updated on the client record.

Once the record is saved, Sandata EVV visits will automatically update with the Medicaid ID. Agencies using an alternate vendor will need to re-submit claims with an updated Medicaid ID number, so the Medicaid ID appends to those visits.



Fact or Fiction: Ordering Devices

Please use the Q & A function to respond FACT or FICTION:

Each provider is required to order an EVV device for their client.

FICTION



Should I request an EVV device?

EVV devices are available to providers who would like to use Sandata Mobile Connect, without downloading the application onto a personal smart device. EVV devices are **not** required and can be ordered and returned at any time.

Providers should work with individuals receiving care to determine the most effective method of visit capture.

Resources

- [Requesting a device in eTRAC](#)
- [Requesting a device in EVV](#)



How do I request an EVV device?

Basic

* indicates required field

FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Burrito"/>	<input type="text" value="Chicken"/>	<input type="text" value="Enter Middle Initial"/>
CLIENT ID *	MEDICAID ID	ALTERNATE MEDICAID ID
<input type="text" value="946167"/>	<input type="text" value="000000000002"/>	<input type="text" value="Enter Alternate Medicaid"/>
CLIENT OTHER ID	SUPERVISOR	GENDER
<input type="text" value="Enter Client Other ID"/>	<input type="text" value="All"/>	<input type="text" value="Select Gender"/>
LANGUAGE PREFERENCE *	TIME ZONE	EMAIL ADDRESS
<input type="text" value="English"/>	<input type="text" value="US/Eastern"/>	<input type="text" value="Enter Client Email Address"/>
SOCIAL SECURITY # 000-00-0000	<input type="checkbox"/> NEWBORN	
<input type="text" value="Enter Social Security #"/>		

REQUEST MVV DEVICE

Fact or Fiction: Returning Devices

Please use the Q & A function to respond FACT or FICTION:

Unused Sandata EVV devices should be returned.

FACT

How do I return a device?

1. The provider will log in to eTRAC to request the return envelope
2. Sandata creates the free return envelope and sends to the individual
3. The individual mails back the device using the free return envelope

Fact or Fiction: Visit Capture

Please use the Q & A function to respond FACT or FICTION:

You can start a visit using one method of visit capture and end a visit using another method.

- Example: using SMC to clock in, and using TVV to clock out

FACT

How can I capture visits?

You can start a visit using one method, and end that visit using another method. If the call in and call out have all the required information, Sandata EVV will match the calls to create a complete visit.

When could this happen?

- Add examples

How can I capture visits?

Sandata Mobile Connect (SMC): Application that can be downloaded onto a personal smart device or on a Sandata EVV device

Telephony: Dial an automated line and answer questions to record a visit

Manual Entry: Log in to Sandata EVV (<https://evv.sandata.com>) and enter the visit information

Fact or Fiction: Client Verification

Please use the Q & A function to respond FACT or FICTION:

ODM permanently removed the EVV electronic signature voice verification requirements for all services in October 2021.

FACT

Client Verification

ODM has permanently removed the EVV requirement for all services. Programs will continue to have the ability to establish documentation requirements to meet their needs.

If you are a caregiver at an agency, the agency may have specific verification requirements that must be met.

Fact or Fiction: Exceptions

Please use the Q & A function to respond FACT or FICTION:

EVV exceptions (missing or inaccurate visit details) should be resolved before submitting claims.

FACT



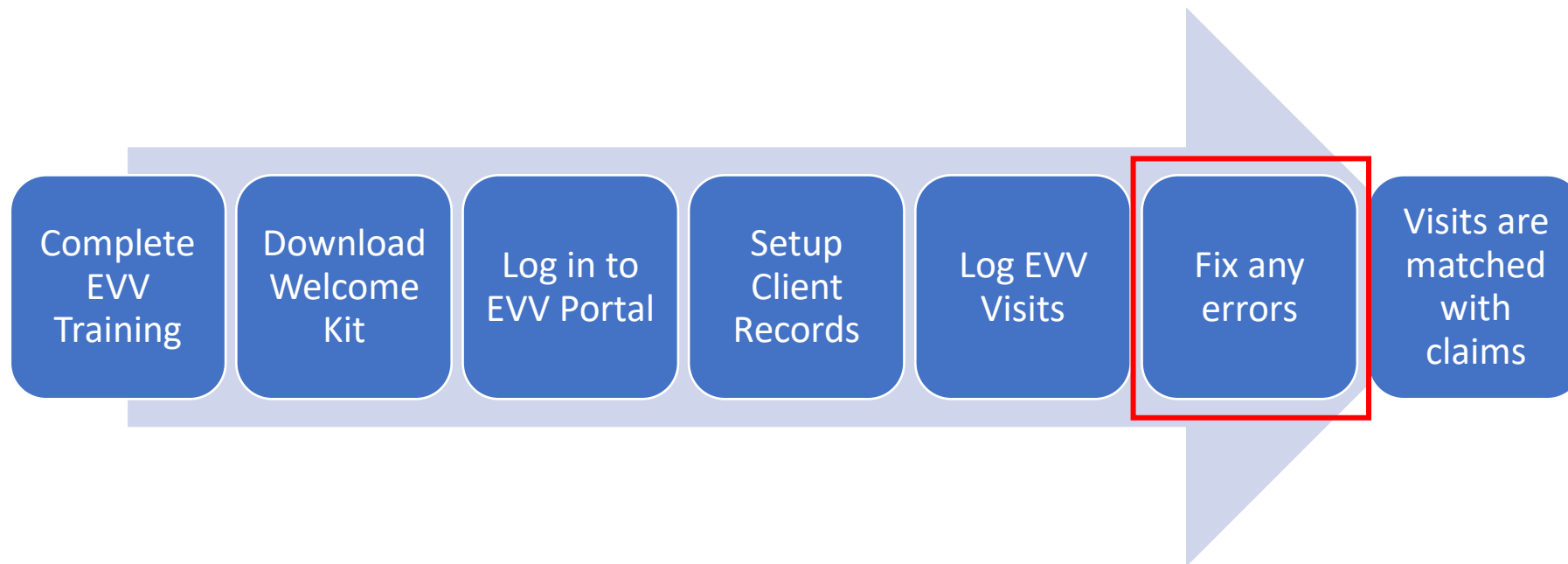
What are exceptions?

EVV will mark certain types of missing or inaccurate visit information as an exception in the Sandata portal and Sandata aggregator

- Missing Service
- Unauthorized Service
- Unknown Client
- Unknown Employee (agencies only)
- Missing Call In
- Missing Call Out

When should I clear exceptions?

Exceptions should be resolved before submitting claims. Only visits **without** exceptions will be considered for claims matching.



How do I find exceptions?

Visit Maintenance Visit Maintenance / **Manage Visits**

Select a Visit CREATE CALL

* indicates required field

DATE RANGE * MM/DD/YYYY		CLIENT	EMPLOYEE
12/01/2021	to 12/31/2021	Enter Client	Enter Employee
PAYER	PROGRAM	SERVICE	CATEGORY
Select Payer	Select Program	Select Service	Select Category
VISIT STATUS	CLIENT MEDICAID ID	FILTER VISITS BY	
Select Visit Status	Enter Client Medicaid ID	All Visits	

Fact or Fiction: Billing

Please use the Q & A function to respond FACT or FICTION:

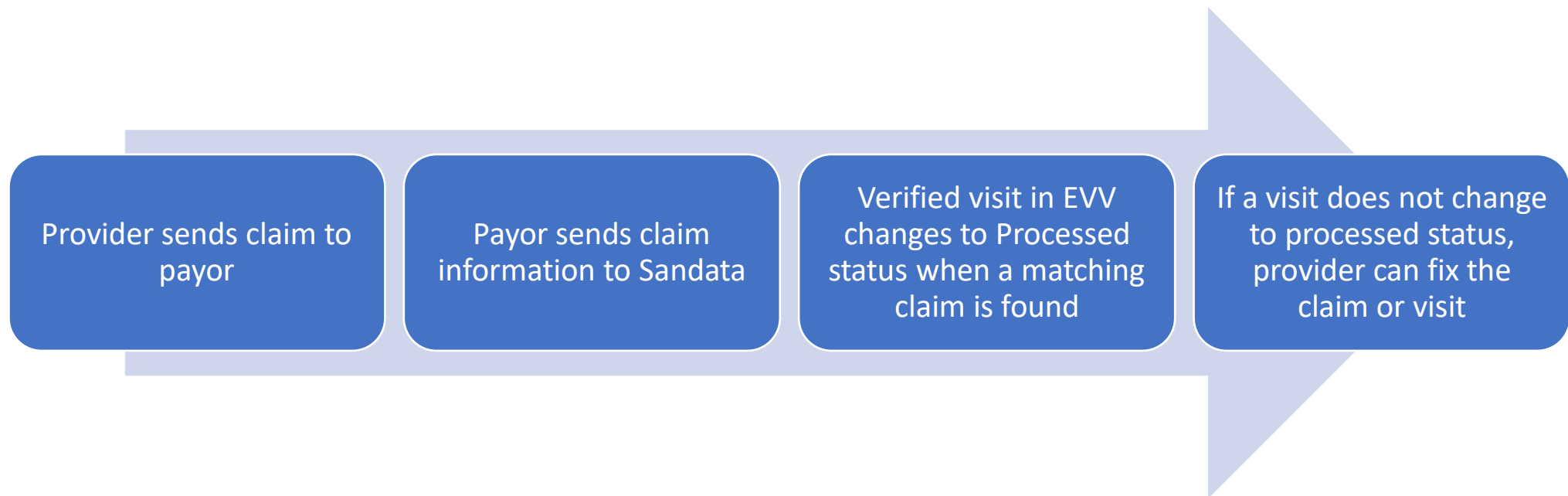
The Ohio Sandata EVV system automatically submits the claim.

FICTION



How does billing connect to EVV?

You cannot submit billing directly from the Ohio EVV solution. Once a claim is submitted to the appropriate payer, the payer will check for a matching visit in EVV when processing the claim.



Fact or Fiction: Visit Status

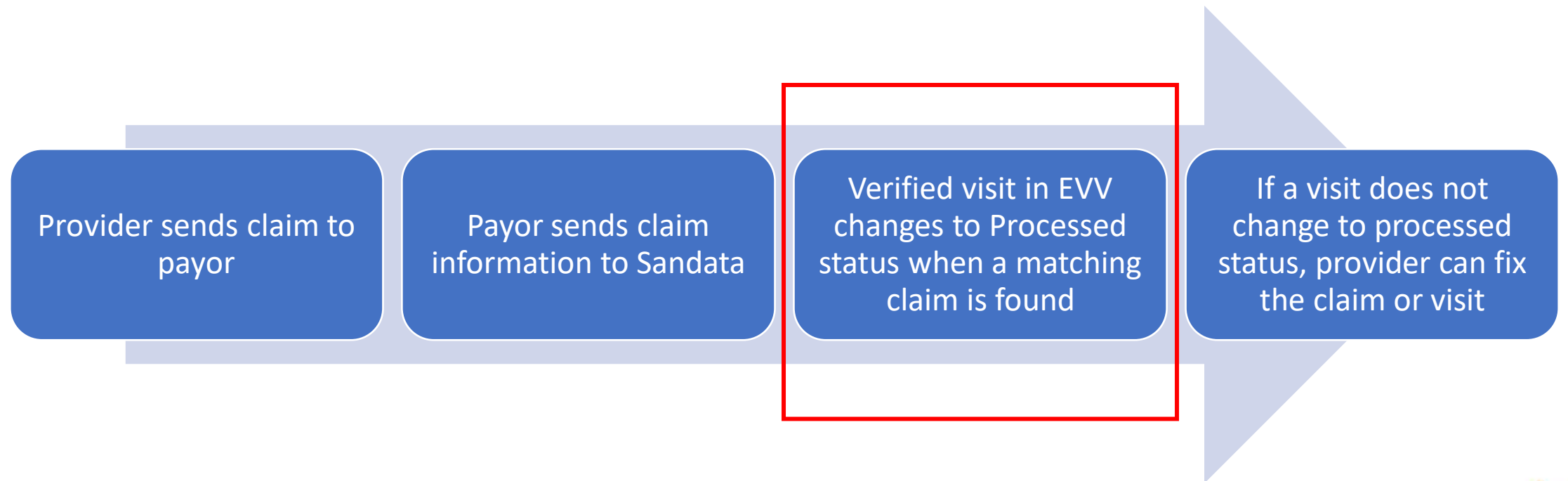
Please use the Q & A function to respond FACT or FICTION:

Visits that have been fully completed and matched with claims will be in a **Verified** status.

FICTION

What is a processed visit?

The final status of an EVV visit is **processed**. A processed visit does not have any missing or inaccurate information, **AND**, that visit has been matched with a submitted claim.



Why aren't my visits processed?

Exceptions

- The visit is in Incomplete status and needs errors fixed

Timing

- A claim is sent to payor before a visit is in a Verified status

No Visit Recorded

- A claim is sent to payor before logging a matching visit in EVV

Incorrect Information

- For example, a visit is logged with a service or client Medicaid ID that does not match the claim



Questions and Resources

Reach Out with Questions

ODM EVV Deep Dive Sessions

Reach Out with Questions

Contacts	Types of Questions
Sandata EVV Provider Hotline ODMCustomerCareEmail@sandata.com 855-805-3505 Hours of Operation: Mon-Fri, 7am-8pm Sat-Sun, 9am-5pm	<ul style="list-style-type: none"> •Sandata technical questions •Device Help •Getting Started with EVV •EVV Visit Maintenance
ODM EVV Team ODMEVV@sandata.com 614-705-1082	<ul style="list-style-type: none"> •EVV policy questions •Services subject to EVV •EVV and claims matching logic •Alternate EVV requirements
ODM Provider Assistance 800-686-1516	<ul style="list-style-type: none"> •Questions on account in MITS •Billing questions •Identify provider Medicaid provider ID •Updating contact information



EVV Helpful Resources

Resource Title	Description
<u>ODM EVV Fact Sheet</u> <i>pdf document</i>	One page summary of the EVV program for providers, agency staff, case managers, and others.
<u>ODM EVV page</u> <i>Webpage</i>	The general ODM EVV webpage for providers and stakeholders.
<u>EVV Newsletters</u> <i>Webpage</i>	Monthly EVV newsletters highlighting program changes/updates. <u>Subscribe</u> to ODM EVV communications.
<u>EVV Webinars</u> <i>Webpage</i>	The ODM EVV team hosts monthly webinars and post the recording and slides from each webinar. Upcoming and historical webinars can be found on the ODM EVV webpage.
<u>EVV Tools and Helpful Documents</u> <i>Webpage</i>	ODM webpage for helpful documents on the EVV program, Sandata system, telephony, devices, payor systems and Zendesk Sandata help desk portal.
<u>Programs and Procedure Codes Included in EVV</u> <i>pdf document</i>	List of covered programs and services subject to EVV requirements, listed by payor.
<u>Time to Units Conversion</u> <i>pdf document</i>	Time to units' conversion for EVV services, by payor.
<u>Sandata Help Desk Ticketing portal – Zendesk</u> <i>Webpage</i>	Helpdesk portal to access open and historical tickets submitted by users to Sandata and the ODM EVV team.

Web Link Appendix